ASSIGNED TASKS

GUIDE

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Introduction

The OnSemble Assigned Tasks Application helps automate task flows and checklists for many different types of processes. Kick off a task flow and let OnSemble delegate individual tasks to the appropriate team members. OnSemble helps you keep track of progress of your task throughout its journey. Employees responsible for completing certain tasks will be alerted when their task queue has items waiting for their attention, making it easy for everyone to keep the task flow moving until completion.

Core Concepts

There are some core concepts and terms that you should be familiar with when dealing with the Assigned Tasks Application. These terms will give you a fundamental understanding of several of the essentials used in the application.

Key Items

The terms below cover the key items in the Assigned Tasks application.

Task

A Task is an individual step in the overall workflow. As Tasks are marked complete, the process moves to the next determined step, one by one, until the entire TaskFlow is complete.

TaskFlow

The TaskFlow is a process configured by the Module Administrator to complete a specific task. A popular example is the "New Hire TaskFlow". This TaskFlow will contain many separate Tasks laid out in a precise order, delegated out and completed one by one to get the entire process complete.

Key People

Here are some key user types that will need to be configured in the Assigned Tasks Application.

Process Managers

Process Managers can use the My TaskFlows Island to view the progress of their TaskFlows.

Process Initiators

Process Initiators are the individuals who can use the My TaskFlows island to kick off a new TaskFlow process.

Task Completers

Each Task in a TaskFlow needs to be completed. Users assigned to the Task Completer status will have the ability to mark their specific tasks as being done, so the process can move along to the next task in the flow.

Islands

There are only two islands for the Assigned Tasks Application: The My Assigned Tasks island, and the My TaskFlows island.

My Assigned Tasks Island

The My Assigned Tasks island is used for keeping track of all of the tasks that are ready for your attention. Use this island to mark Tasks as complete, so they can continue to move through the entire TaskFlow.

My TaskFlows Island

As a Process Manager, keep track of your TaskFlows that are currently in progress with the My TaskFlows Island. At any time, you'll be able to use this island to call an audible, reassigning delegated tasks as needed to ensure workflow progresses and is eventually completed.

Important Module Properties

Module Properties for the Assigned Tasks Application can be found in Module Tools > Assigned Tasks > Module Properties. Here, you'll find two settings, but only one that might ever need to change. **TasksAttachmentsPath** is the file path to the location where Task attachments will be saved.
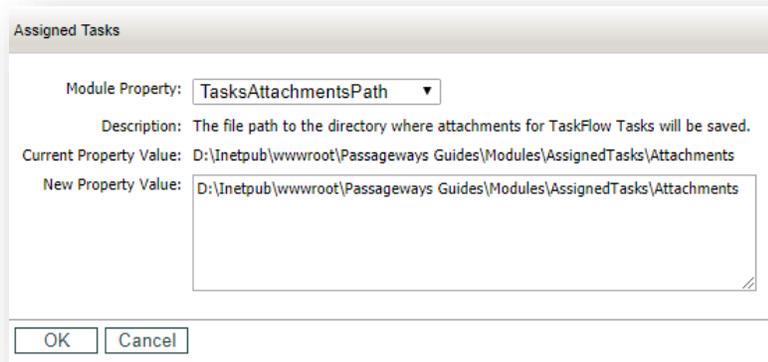
Managing TaskFlows

TaskFlows are created, edited, and managed from the Manage TaskFlows Module Tool. To access this location, navigate to Module Tools > Assigned Tasks > Manage TaskFlows.
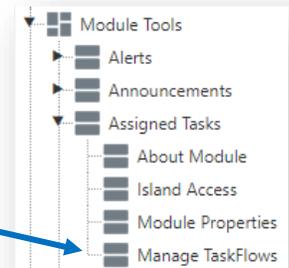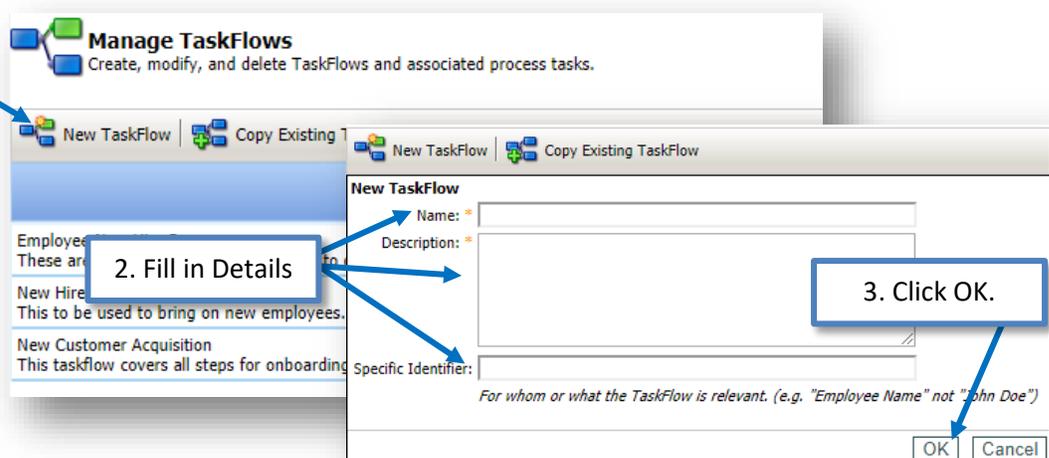

Manage TaskFlows

Creating a New TaskFlow

The creation of TaskFlows is performed by the Portal Administrator, or anyone who has been assigned as a Module Administrator for the Assigned Tasks Module Tool. Generally, if a new TaskFlow is needed, a request is sent to this person to create it.

To create a new TaskFlow, simply click New TaskFlow at the top of the Manage TaskFlows page. Give your new TaskFlow a name, description, and unique identifier. The identifier is a field that will help distinguish simultaneous TaskFlows of the same type from one another. As an example, if you are creating a New Hire workflow, you might want to put "Name" or "Employee ID" as the Identifier. This way, when this TaskFlow is initiated, the Name or the ID is used to differentiate the multiple TaskFlows.

1. Click New!

2. Fill in Details

3. Click OK.

Editing a TaskFlow

To edit any of the details set during the creation of the TaskFlow, click the Edit icon next to the TaskFlow in the Manage TaskFlows Module Tool, make your desired changes, and then click Update to save them.

Managing Process Managers

Now that our new TaskFlow has been created, we can associate some users who will be the Process Managers. These users will oversee the entire process as it is being executed. Click the icon in the Edit Process Managers column to begin. Use the user-selection tool to move any number of users from the left column into the right column to grant the Process Manager permission, then click OK to save.
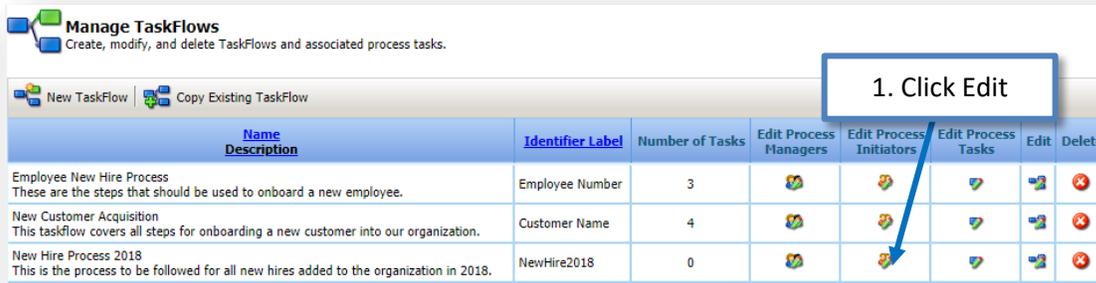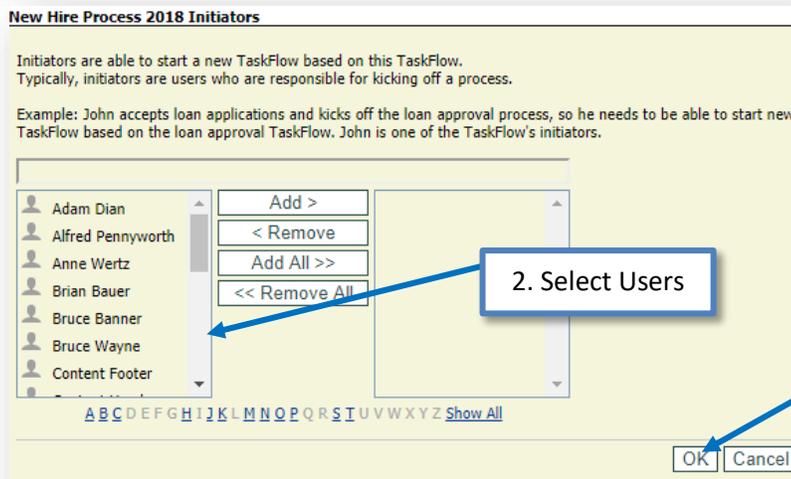
Managing Process Initiators

Next, we will select the users who will be the Process Initiators for this new TaskFlow. Users selected for this permission will be able to kick off the TaskFlow process and begin the entire process. Setting this up is almost identical to how we set the Process Managers in the previous step. Click the Edit button under the Edit Process Initiators column, then use the selection tool to choose which users will have this permission, and click OK to save.

Managing Process Tasks

TaskFlows are made up of a series of Tasks that need to be completed. Tasks are generally assigned to a specific user or role to complete, and are occasionally dependent on another task being completed before another can be finished. Click the Edit Process Tasks icon to get started.

Creating New Tasks

Click the text that says "Create New task for…" and begin filling in the details of your first step of the TaskFlow. Type in a name and description for this task. Next, select if this task will be dependent on another task in this workflow. Lastly, choose the user(s) who will have the authority to mark this task as being complete and send the TaskFlow to the next Task. Feel free to choose as many users as you think necessary here. Any one single person can mark the task as complete to continue the progress.

Below is an example of a TaskFlow containing five Tasks. When a Process Initiator starts this TaskFlow, both the "CopyID" task and the "Give Tour" tasks are sent out to be completed immediately. The "CopyID" task can be completed by anyone in the Senior Managers Role, but only Anne or James can complete the "Give Tour" task.
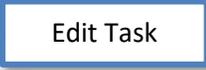
When the "CopyID" task is marked as complete, Matt and Nathan will receive alerts that the "Give Copy of ID to HR" and "Give Copy of ID to IT" tasks are now ready to be completed. This is due to the task dependency configured during the Task creation step mentioned above.

Summary	Description	Can Perform Task	Edit	Delete
Copy ID	Photocopy new hire's Identification	Roles: Senior Managers		
↳ Give copy of ID to HR	Deliver a copy of the new hire's ID to the HR Department.	Users: Matt Holmes Nathan Deno		
↳ Give copy of ID to IT	Deliver a copy of the new hire's ID to the IT Department.	Users: Matt Holmes Nathan Deno		
↳ Create Windows Login Account	Create a new windows login for the new hire.	Users: Shane Reining		
Give Tour	Give the new hire a tour of the facilities.	Users: Anne Wertz James Howlett		

Editing and Deleting Tasks

Individual TaskFlow Tasks can be altered or removed entirely by clicking the respective Edit and Delete buttons located below.

Summary	Description	Can Perform Task	Edit	Delete
Copy ID	Photocopy new hire's Identification	Roles: Senior Managers	✎	✖
↳ Give copy of ID to HR	Deliver a copy of the new hire's ID to the HR Department.	Users: Matt Holmes Nathan Deno	✎	✖
↳ Give copy of ID to IT	Deliver a copy of the new hire's ID to the IT Department.	Users: Matt Holmes Nathan Deno	✎	✖
↳ Create Windows Login Account	Create a new windows login for the new hire.	Users: Shane Reining	✎	✖
Give Tour	Give the new hire a tour of the facilities.	Users: Anne Wertz James Howlett	✎	✖

Edit Task

Delete Task

Working with the My TaskFlows Island

The My TaskFlows island is used by both the Process Managers and the Process Initiators. Managers will use this island to review the progress of their TasFlows, and Initiators will use it to start a new TaskFlow.

Viewing In-Progress TaskFlows

For a Process Manager, the My TaskFlows island will display a list of TaskFlows that have already been initiated and are somewhere in the middle of their process. Details of each separate TaskFlow can be viewed by simply clicking the + symbol located next to the TaskFlow's name. View the details of any one single task by clicking the task's name.

Initiating a TaskFlow

As a Process Initiator, use the Actions Menu of the My TaskFlows Island to begin a new TaskFlow process. Click the Actions Menu icon, then select Start New TaskFlow.

The first step will be to choose which TaskFlow you'd like to initiate. When you make a selection from this list, the rest of the form will pop into place. Give your new TaskFlow a name. Something like "New Hire Paperwork for Jane Smith". Next, choose roughly how many days you think each task in the TaskFlow will take to complete. Click Next to continue.

Based on the number of days estimated in the previous step, a calendar will appear with a yellow and green highlighted date. Choose a date from the calendar for the estimated overall TaskFlow completion date. Include any comments you'd like to include with this TaskFlow initiation, and click Next to continue.

The last step is just a short confirmation message, letting you know that certain members of the team will be getting alerts about this newly-initiated TaskFlow. Click Finish to wrap up the process and begin working on each separate task.

Rename Running TaskFlow

Any TaskFlow that is in mid-process can be renamed by the Process Administrator. Just use the Island's Actions menu to select Rename Running TaskFlows.

Click Edit for the TaskFlow you'd like to change, update the information, and click Update to save.

Reassigning or Complete Running TaskFlow Tasks

As the Process Manager, use the Actions menu to select Reassign or Complete Running TaskFlow Tasks.

Select a running TaskFlow from the dropdown menu and click View to see all the current tasks. Use the dropdown menu on any of the tasks to select either Reassign or Complete. Choosing Reassign will allow you to make changes to the list of Task Completers for this TaskFlow. Choosing Complete will allow you as the Process Manager to mark a task as complete, even though you might not be listed as the Task Completer. Either of these options can be an incredibly useful tool when your normal Task Completers are out on vacation.

Working with the My Assigned Tasks Island

The My Assigned Tasks island is used by individuals to view and complete any tasks that have been assigned to them as Task Completers. The user can attach files to a listed task from the dropdown seen below, before marking the task as complete.

Marking a Tasks as Complete

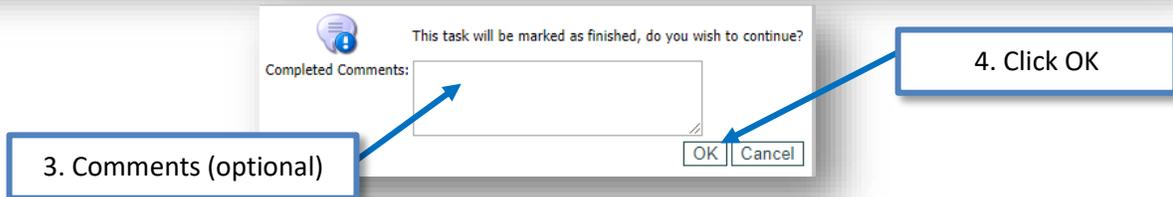On the My Assigned Tasks Island, use the dropdown menu next to any task in the list, and click Done. Include any comments you'd like to share about the task at hand, and click OK to finish it!